



U.S. General Services Administration

# Federal Acquisition Service

## **Market Analysis**

*GSA Training Module for IWAC Region*

# Market Analysis Training Module Overview

**Description:** This training module will take you step-by-step through the Market Analysis document in the Regional Business Application (RBA) IT-Solutions Shop (ITSS) component, specifically the IWAC region.

**Navigation:** If the tutorial opens up in your web browser, simply click your mouse or your space bar to advance to the next slide. Use the “Backspace” key to go back. If the tutorial opens in the PowerPoint application, click on “F5” to view the tutorial. Use the spacebar or click your mouse to advance to the next slide. To go back, click on the “Backspace” key.

# Market Analysis Glossary

Term	Definition
Market Analysis	The process of selecting a winning vendor once the RFQ has been closed.
Client Acceptance Required	Option on Market Analysis to require client approval of GSA recommended Quote.
Contractor Bid Table	An excel sheet exportable from the Market Analysis document showing information from Contractor bids at the task item level.
Dollars Subform	The Dollars Subform has fields for capturing costs, fees, totals, and other money-related values.

# Market Analysis Privileges

User Role   Action	Create	Edit	View
GSA Users	✓ *	✓	✓
Clients		✓ **	✓
Contractors			

\*Cannot create Market Analysis if RFQ was an RFI from e-Buy.

\*\*Clients can edit if Market Analysis status is 'Pending Client Acceptance' otherwise they have read-only access.



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WELCOME

**ORDERS**

FUNDING

REGISTRATION

CONTRACTS

Select a View:

&lt;&lt;-- View Orders --&gt;&gt;



&lt;&lt;-- View Inactive Orders --&gt;&gt;



&lt;&lt;-- View Action Items --&gt;&gt;



&lt;&lt;-- View Support Information --&gt;&gt;



Go to a Specific View Item:

[Create New Order](#)**Orders - Entire Package**

Next -&gt; |

## ▼ Order Package

## ▼ REQUISITION005-COI Jamie Client (Test Organization) Award Notice Issued&gt;&gt;ROB

00 Chronology

## ▼ 01 BOM/SOW REQUISITION005 - 00 Amendment 00 AWARD NOTICE ISSUED

## ▼ RFQ Modification 00 Amendment 00 Revision 00 GSA APPROVED

Quote Amd 00 Rev 00 for Jim Contractor (TEST COMPANY CORP INC) Cnt# 263-97-D-0313, BID=\$883,500.00


Quote Amd 00 Rev 00 for William Vendor ( ACME CORPORATION) Cnt# GS-02F-0154R, BID=\$925,000.00

Quote Amd 00 Rev 00 for Patricia Partner (COMPANY ASSOCIATED) Cnt# GS-35F-0390K, BID=\$900,000.00

\*Market Analysis Amendment 00 - Quote Selected: Jim Contractor - TEST COMPANY CORP INC (263-97-D-0313), \$927,675.00

&gt;Notice of Award - Signed

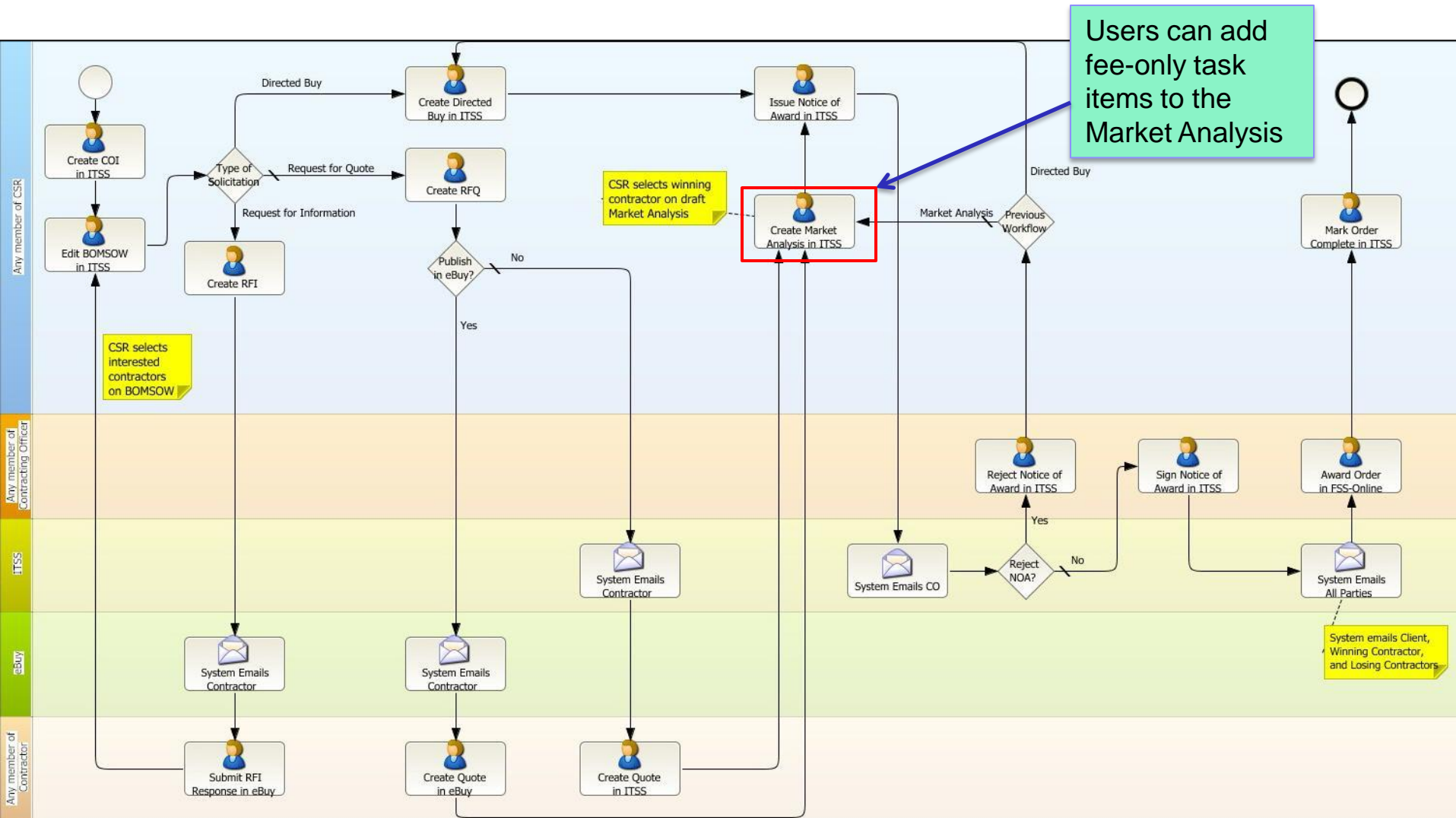
Click on the Market Analysis link in the Order Package view to open an existing Market Analysis in view mode



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# Within the Pre-Award Workflow Context



A *non-draft* Market Analysis contains a Dollars Subform. A *Dollars Subform* is also displayed on the Directed Buy. The Dollars Subform has fields for capturing costs, fees, totals, and money-related values.



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WELCOMEORDERSFUNDINGREGISTRATIONCONTRACTS

Request for Quote

Create Faxed QuoteMarket AnalysisEditGo To Order Package

Submitted By: CSR1 IWAC on 10/12/2010

Order ID: REQUISITION003, Mod 00, Amendment 00, Revision 00

Publish in e-Buy: No

Client Rep: Jamie Client (Test Organization)

Status: Closed

Click on the Market Analysis button on the RFQ form to generate a new Market Analysis in draft mode

## Market Analysis

[Close Without Saving](#)

**Submitted By:** George Gsa at 01/20/2010  
**Order ID:** TRAINING001 **Mod:** 00 **Amendment:** 00  
**ActNumber:**  
**Status:** **Draft**  
**Option Period:** ☐ Yes ☒ No

 All Fields marked with  are required.

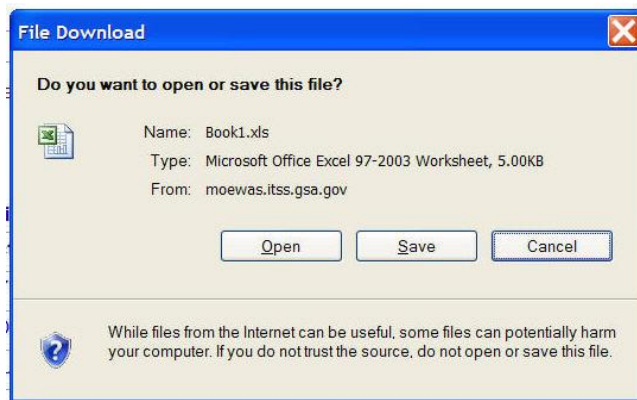
[Export Bids at Task Item Level](#)

The Contractor Bid Table shows a summary of all total quote amounts. Click on the *Export Bids at Task Item Level* button to generate an Excel spreadsheet with contractor quote data.

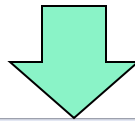
### CONTRACTOR BID TABLE (ranked list by price)

	Contractor List	Total Order Price	Submitted Date	All Req Met	Delivery Dates Met
1	Jim Contractor - TEST COMPANY CORP INC (GS-32A-3234)	\$155,000.00	01/14/2010	Y	Y
2	William Contractor - Acme Consulting INC (GS-34L-4040C)	\$245,000.00	01/15/2010	Y	Y
3	Patricia I. Partner - IT-Industries LLC (GS-22A-1234)	\$753,500.00	01/14/2010	Y	Y





Open the spreadsheet to view all contractor quote data at the task item level



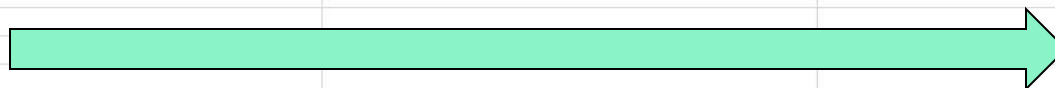
Book1(1).xls [Compatibility Mode] - Microsoft Excel

	A	B	C	D
1	#	1	2	
2	Contractor List	Jim Contractor - TEST COMPANY CORP INC	Victoria Vendor - ACME CONSULTING INC.	Patrick I. Partner - Vendor Specialists LLC
3	Task Item 0001 Price	\$20,000.00	\$15,000.00	\$8,500.00
4	Task Item 0002 Price	\$25,000.00	\$40,000.00	\$125,000.00
5	Task Item 0003 Price	\$25,000.00	\$40,000.00	\$130,000.00
6	Task Item 0004 Price	\$25,000.00	\$45,000.00	\$140,000.00
7	Task Item 0005 Price	\$25,000.00	\$45,000.00	\$150,000.00
8	Task Item 0006 Price	\$25,000.00	\$50,000.00	\$175,000.00
9	Task Item 0007 Price	\$10,000.00	\$10,000.00	\$25,000.00
10	Total Order Price	\$155,000.00	\$245,000.00	\$753,500.00
11				
12				
13				
14				

Task Item Quote Amounts are displayed as rows



Contractors are displayed as columns



### ▼ GSA Analysis

Include all information to justify GSA's contractor selection to the client.

#### File Attachments:



Select  
Recommended  
Contractor Quote:

Fair Opportunity  
Properly  
Conducted:

--Select Winning Contractor--

☐ Yes ☐ No

GSA Comments:

### ▶ Edit History

Submit

Close Without  
Saving

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Select one of the following options for the winning contractor list:

1. Select a winning contractor from the submitted quotes.
2. Save the Market Analysis as a draft
3. Select "No Contractor Selected" to reject the Market Analysis, RFQ and all Quotes

Indicate whether fair opportunity was properly conducted. This is for reporting purposes.

By selecting a contractor and then clicking the *Submit* button, the Market Analysis form will re-load to be in an *In-Process* status

## Market Analysis

Close Without Saving

Submitted By: CO IWAC at 10/12/2010  
 Order ID: REQUISITION003 Mod: 00 Amendment: 00  
 ActNumber:  
 Status: **In-Process**  
 Option Period: ☐ Yes ☒ No

If there is an option period indicate Yes and enter the option period length in years. These fields are only displayed on basic orders and are used for reporting purposes.

All Fields marked with are required.

### ▼ GSA Analysis

Include all information to justify GSA's contractor selection to the client.

File Attachment

Attach Files

Contract Number submitted by contractor and Contract Type

Selected Contractor: Jim Contractor

Contract Number: 263-97-D-0313

Contract Type: << Select >>

Fair Opportunity Properly Conducted: ☒ Yes ☐ No

Number of Bids: 3

If indicated that Fair Opportunity was properly conducted then a Number of Bids received field will be displayed and required.

If indicated that Fair Opportunity was not conducted then Exception and Justification fields will be displayed and required.

Current Project Value: \$894,500.00 (POP From Date 12/01/2010 To 12/23/2010, Delivery Date 12/01/2010)

**Incremental Funding**  
 Will this order use Incremental Funds? ☐ Yes ☒ No  
 Grand Total for Incremental Funding: \$894,500.00  
 Total Contractor Proposed Amount: \$894,500.00

**Fee Calculations**  
 The following fields are used for entire Project order amounts. Task Items marked "Active" will require Funding.  
 Add a Task Item

Apply a single surcharge rate across all task items? ☒ Yes ☐ No 5% Apply

Active	Type	Item No.	Description	Contractor Proposed Amount	Prior Cost to GSA Increase or Decrease	New Task Item Amount	Type of Charge	Fee Amount	Cost to GSA	Cost to Client	Remove
<input checked="" type="checkbox"/>	COM	0001	Workstations	\$500,000.00	\$0.00 \$500,000.00	\$500,000.00	Surcharge	5% \$25,000.00	\$500,000.00	\$525,000.00	
<input checked="" type="checkbox"/>	COM	0002	Desks	\$75,000.00	\$0.00 \$75,000.00	\$75,000.00	Surcharge	5% \$3,750.00	\$75,000.00	\$78,750.00	
<input checked="" type="checkbox"/>	COM	0003	Chairs	\$35,500.00	\$0.00 \$35,500.00	\$35,500.00	Surcharge	5% \$1,775.00	\$35,500.00	\$37,275.00	
<input checked="" type="checkbox"/>	COM	0004	Demountable Walls	\$234,000.00	\$0.00 \$234,000.00	\$234,000.00	Surcharge	5% \$11,700.00	\$234,000.00	\$245,700.00	
<input checked="" type="checkbox"/>	LAB	0005	Installation	\$50,000.00	\$0.00 \$50,000.00	\$50,000.00	Surcharge	5% \$2,500.00	\$50,000.00	\$52,500.00	

Click the button to calculate the total amounts  
 Calculate

**ORDER TOTALS**

Prior Order Cost to GSA:	\$0.00	Prior Order Cost to Client:	\$0.00
Increase/Decrease Order Cost to GSA:	\$894,500.00	Increase/Decrease Order Cost to Client:	\$939,225.00
Total Order Cost to GSA:	\$894,500.00	Total Order Cost to Client:	\$939,225.00

Client Acceptance Required? ☐ Client Acceptance Required ☒ Client Acceptance Not Required

GSA Comments:

Edit Dates & Times  
 10/12/2010 01:34 PM EDT

Submit Close Without Saving

Dollars Subform – various task item attributes such as:

- New Task Item Amount

- Type of Charge

are editable on an in-process Market Analysis

Indicate whether the Market Analysis requires approval from the client

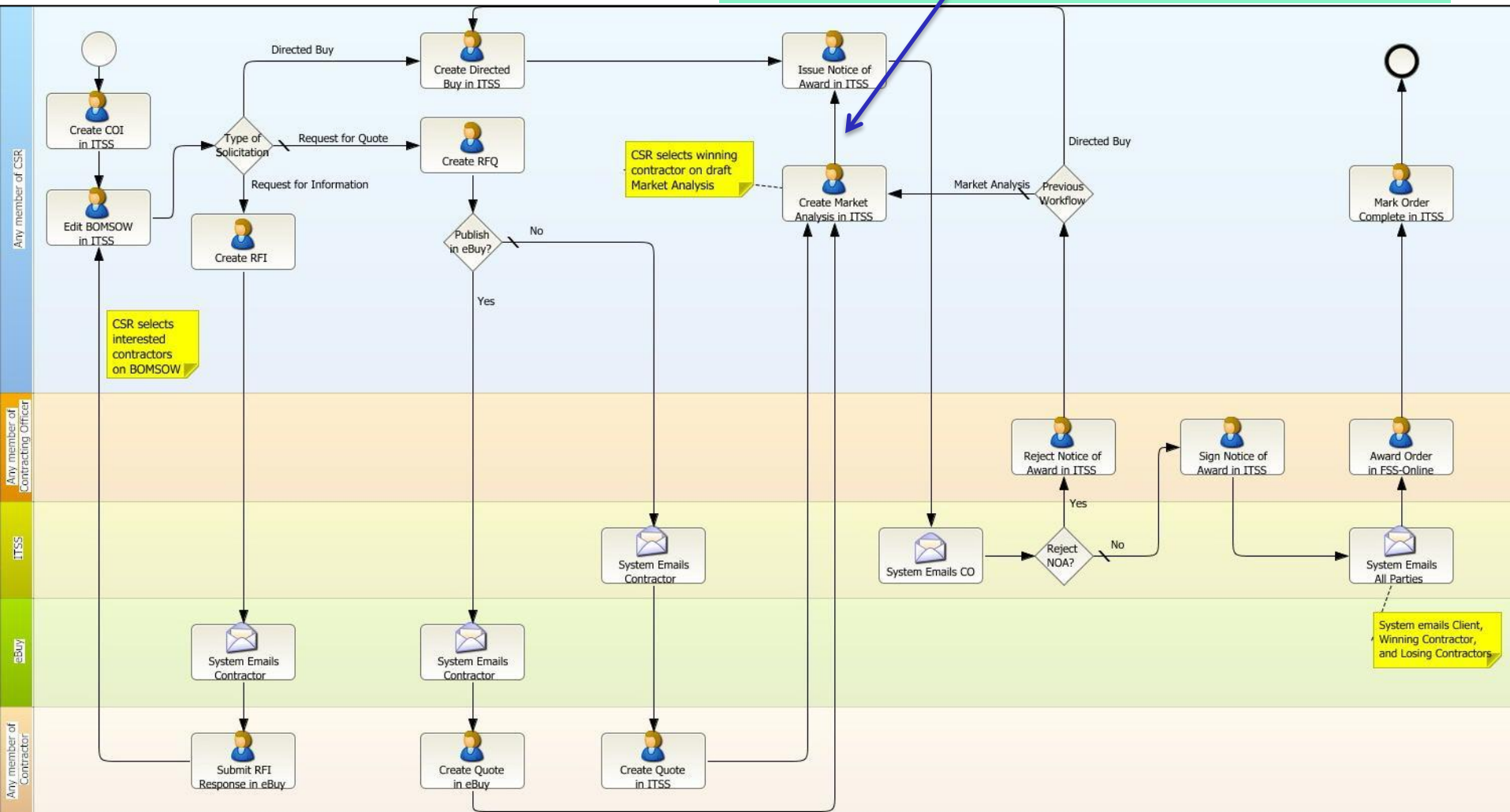
Click *Submit* to save the Market Analysis values and proceed with either MA approvals or creation of the Certification of Funds document

The Dollars Subform is covered in detail within the *Dollars Subform* training module



# Next Steps...

If the Market Analysis requires approval (by either GSA Approving Official or Client) then it must be approved before the user can issue a Notice of Award



All task item details (item no., description, pop/delivery date) are locked-down as non-editable when a Notice of Award is created.

# Market Analysis Status Glossary

Status	Definition
Draft	Market Analysis has been created but no winning quote has been selected.
In-Process	A winning quote has been selected, but the GSA Fees and Client Acceptance still need to be specified.
Quote Selected	A winning quote has been selected, GSA Fees have been calculated, and Client Acceptance/Approving Official Acceptance was not required. Order is ready for the Certification of Funds or the Market Analysis can be rejected.
Quotes Rejected	'No Contractor Selected' option has been selected.
GSA Recommendation	A winning quote has been selected, GSA Fees have been specified, and Approving Official Acceptance and/or Client Acceptance options have been specified.
Approving Official Accepted	A winning quote has been selected, GSA Fees have been specified, and Approving Official acceptance was required and subsequently approved.
Recommendation Accepted	A winning quote has been selected, GSA Fees have been specified, and Client Acceptance was required. Client (or GSA Rep) accepted the recommendation. The order leg is ready for the Certification of Funds, or Market Analysis can be rejected.
Recommendation Rejected	A winning quote has been selected, GSA Fees have been specified, and Approving Official acceptance and/or Client Acceptance was required. Either Approving Official or the Client (or the GSA rep) rejected recommendation. If the Approving Official rejected, then a new Market Analysis needs to be created from the RFQ to proceed with the order. If the Client rejected, then a new Request for Quote is necessary since another Market Analysis can no longer be created from the same RFQ.
Rejected	Market Analysis has been soft-rejected via the 'Reject Mkt Analysis' button on the Market Analysis. The order was ready for Certification of Funds prior to Rejection. A new Market Analysis can be created from the existing RFQ.



## Federal Acquisition Service

## Questions & Support

- For questions regarding IWAC Policy please contact [stephen.gervasi@gsa.gov](mailto:stephen.gervasi@gsa.gov)
- For questions regarding the RBA Market Analysis training module please contact RBA Technical Support:
  - Phone: (877) 243-2889
  - Email: [helpdesk@gsarba.com](mailto:helpdesk@gsarba.com)

